

RESOLUTION NO. 86-161

RESOLUTION ADOPTING CITY OF LODI
FIVE YEAR TRANSIT PLAN

WHEREAS, public transit remains a major service provided in Lodi and San Joaquin County; and

WHEREAS, in order to continue providing high levels of service, avoid duplication of service, and plan for future growth and development of transit systems, it is necessary to plan ahead.

WHEREAS, it is the City's objective to continue to meet the reasonable transit needs of all City residents in the most cost effective means possible. This includes fostering community awareness, clean vehicles, courteous drivers, adequate insurance and assisting San Joaquin County to meet their unmet needs.

NOW, THEREFORE, BE IT BE RESOLVED, that the City Council of the City of Lodi does hereby adopt the City of Lodi Five-year Transit Plan, a copy of which is attached hereto, marked Exhibit "A", and thereby made a part hereof.


Dated: November 5, 1986

I hereby certify that Resolution No. 86-161 was passed and adopted by the City Council of the City of Lodi in a Regular Meeting held November 5, 1986 by the following vote:

Ayes: Council Members - Hinchman, Olson, Pinkerton, Snider,
and Reid (Mayor)

Noes: Council Members - None

Absent: Council Members - None


ALICE M. REIMCHE
City Clerk

RECEIVED

DATE: 11/5/86

ALICE M. REIMCHE
CITY CLERK
CITY OF LODI

LODI FIVE YEAR TRANSIT PLAN

INTRODUCTION/SERVICE DESCRIPTION

This plan discusses current transit issues in the City of Lodi, and lists the objectives of the Lodi City Council in providing for public transit. Also identified are the actions which the City intends to take over the next five years to meet these objectives, as well as estimates of the funding which will be needed.

The Lodi Dial-A-Ride currently operates 12 hours a day, five days a week. Service is provided in seven City-owned Chevrolet station wagons. Five vehicles use gasoline, and two older station wagons use diesel. Daily operation is contracted to the City Cab Company, which also provides (in separate vehicles) a private taxi service.

The area served is the corporate limits of the City of Lodi. However, through a contract with San Joaquin County service is available to Woodbridge and the Arbor Mobile Home Park in Acampo. Dial-A-Ride fares are paid by prepurchased tickets only, and cost \$.50 for seniors and handicapped, and \$1.00 for regular passengers within City limits. County services costs \$1.00 for the elderly and handicapped and \$2.50 for all others. Up to three may ride for the price of one, if travelling from the same origin point to the same destination point. Dial-A-Ride users must be willing to share the vehicle with others. Service is available on a demand response basis and also includes subscription service (i.e., pickup at a prearranged future date and time).

Contractual arrangements require all normal operating expenses, including fuel and maintenance costs, to be borne by the cab company. Insurance costs are now paid by the City due to very high costs and limited coverage available.

In recent years, the Lodi Dial-A-Ride has become very popular with local seniors, who comprise the large majority of the ridership. The business community has also responded enthusiastically supporting the current third annual Rotary Club promotion. The Rotary Club supplied 1,484 free Dial-A-Ride tickets to local seniors, for one month in 1985. This program may be expanded next year.

ACCOMPLISHMENTS

The Lodi Transit Program has undergone a number of changes since February 6, 1985 when the City Council adopted the initial Five Year Transit Plan. It responded to concerns expressed at the previous Unmet Needs hearing, and its major recommendations have since been implemented.

Saturday Dial-A-Ride service was implemented during the summer of 1985. The system now operates six days per week.

The general public Dial-A-Ride fare was lowered during 1985 to encourage ridership. Several diesel powered taxis were replaced with more reliable gasoline powered vehicles, and the fleet was expanded by one vehicle. This helped to alleviate the problem of excessive waiting times which had been reported at the previous Unmet Needs hearing. At present, the system's goal of waiting times no longer than 45 minutes is being realized with few exceptions.

Pre-arranged subscription service was initiated during 1986 to give riders some of the benefits of a fixed route service. Passengers can call in advance to arrange to be picked up at a specified time.

Needs expressed at the January 1986 Unmet Transit Needs public hearing included a number of requests, most carried over from previous years:

UNMET NEEDS PROCESS

1. Local fixed route transit service, to be operated in conjunction with the Dial-A-Ride service.
2. Sunday service.
3. Evening service.
4. Service between Lodi and Stockton.
5. Better advertising of the general public Dial-A-Ride service.
6. Efforts to make riders aware of the importance of being ready to go when taxis arrive.

The demographic data reveals relatively high concentrations of seniors (15.8% 65+ vs. county average of 11.3%) but much lower numbers of low income residents.

CURRENT ISSUES

1. Possible need for additional Dial-A-Ride service on Sundays.
2. Possible need for evening service.
3. Possible need for fixed route scheduled service.
4. Need for intercity service to Stockton.
5. Need to adopt a policy on coordination with the County of San Joaquin.

By law, the San Joaquin County Council of Governments is empowered to make the final decision concerning reasonable unmet transit needs in the City of Lodi and elsewhere in the County. One purpose of this plan is to inform the COG of the City's position on the above and related issues. By presenting the COG with an adopted transit plan which shows a commitment to local transit development, it is felt that the City's own interests will best be served.

Evening and Sunday Service

The City of Lodi is committed to meeting the reasonable transit needs of all City residents. However, the City feels that the requests for Sunday and extended weekday Dial-A-Ride service go beyond basic needs. Concerning potential Sunday service, the City is not prepared to transport the large number of passengers who might be expected to request travel to religious services - it is felt this function is properly the responsibility of the churches and their congregations. The COG's adopted definition of "unmet transit needs" does not specifically mention transportation to religious services.

The company is already experiencing difficulty in finding drivers who will work on Saturdays, and their dispatcher is working six-day weeks. Sunday service would likely exacerbate staffing problems for the company.

The City feels that there is no indication that evening Dial-A-Ride service is essential to meet "Unmet Needs" in view of the 12-hour six-day-per-week service that is presently provided. COG staff supports the City's decision.

Scheduled Service

The possible need for fixed route scheduled transit service is highlighted by the recent petition calling for a fixed route system. The City's position is that fixed route transit is a method of service delivery, rather than a transit need. The City is reluctant to implement such a change because it may favor only a few individuals at the expense of the system as a whole. Also, the current contractor may be unable to adapt its operation to include fixed route scheduled service. More information is

needed about the extent of this potential need and the implications of initiating fixed route service. The City has recently initiated subscription service which may resolve the need for scheduled service.

COG staff believes that viable fixed route transit is possible in the City of Lodi. The large population of seniors, the relatively compact pattern of settlement, the square grid street layout, and the conclusion of previous studies (especially the 1981 Caltrans fixed route study) all support this statement. The belief that a fixed route system is viable, however, does not necessarily mean that a fixed route system should be immediately implemented. The question of timing is important, especially since the Lodi Dial-A-Ride has in fact been a highly successful transit system.

In informal discussions with COG staff, Caltrans staff have cited the 40,000 population figures as a rough "rule of thumb" for fixed route transit. In other words, cities larger than 40,000 people are typically large enough to support fixed route transit. While not disagreeing with this concept, COG staff's research has revealed several cities larger than Lodi which are successfully served only by demand responsive transit. In California, this includes the cities of El Cajon, La Mesa, Visalia, Davis, Corona, and Merced. Perhaps more to the point, one document reports that demand responsive transit "has been considered appropriate for areas with a population density of between 3,000 and 7,000 persons per square mile." The City of Lodi falls in the lower half of this range, with a population density of 4,360 people per square mile.

Rather than embrace, perhaps prematurely, a fixed route transit system, the City of Lodi desires to improve the Lodi Dial-A-Ride. COG staff supports this course of action. In particular, the recently initiated subscription service will hopefully prove feasible to implement, thus giving regular riders some of the features of a fixed route system. The City views fixed route transit not as a need, but as a method of meeting needs. The potential need to be met was for passengers to know ahead of time when they can ride.

In order to meet this need, Lodi has initiated subscription service. Passengers can now call in advance to arrange to be picked up at a specific time. To date, usage of this service has been disappointing.

It is possible that limited fixed-route service could be implemented in connection with Lodi-Stockton intercity service, to be discussed below.

Intercity Fixed Route Service

Intercity fixed route service between Lodi and Stockton is listed in the Five Year Transit Plan as a potential future issue. The

City has up to now taken no position on such service, but feels that it should not be funded out of local LTF and STA funds.

Stockton Metropolitan Transit District (SMART) is currently studying the feasibility of instituting intercity service within San Joaquin County. SMART staff have been requested to coordinate with the City of Lodi on this.

It should be noted that fixed route general public Lodi-Stockton service is presently provided by Greyhound, while CAT provides intercity transportation to the elderly and handicapped. COG staff recommends that the City of Lodi coordinate with SMART staff on SMART's intercity bus study. As Greyhound and CAT presently provide Lodi-Stockton service, it is the feeling of COG staff that there is no unmet need for Lodi-Stockton intercity service.

Coordination with San Joaquin County

This issue is one of increasing concern to the City. Over the past two years, the City of Lodi has contracted with San Joaquin County to provide service to first Woodbridge and then the Arbor Mobile Home Park in Acampo. In both cases, the expansion was triggered by a COG finding of reasonable transit needs for County residents. However, the resulting ridership has been marginal at best. The City is concerned that the City system not be jeopardized by marginal County transit needs.

Performance Audit Recommendations

The auditing firm of Deloitte, Haskins, and Sells performed a tri-annual performance audit in 1986 and reported on that audit in June of 1986. They recommended that the City and COG develop formal procedures for evaluating results of the Unmet Needs hearing prior to implementing service or policy changes. This evaluation should include estimating the:

- . extent of public support for the proposed change
- . ridership impact of the proposed change
- . cost impact of the proposed change

The auditors also commend the City for developing tools to measure operating performance such as the response time spreadsheet model. A spreadsheet program has also been developed to record and calculate operating statistics. They recommend that the City expand the spreadsheet to integrate the financial data necessary to compute all TDA-required indicators and further measure performance.

POLICY SECTION

The following service objectives have been developed for the Lodi Dial-A-Ride.

1. Meet the reasonable transit needs of all City residents.
2. Minimize system operating costs.
3. Operate an efficient transit system: meet the required 10% farebox recovery ratio.
4. Foster community awareness and support for the Lodi Dial-A-Ride: strive to increase system ridership.
5. Assure the provision of a quality transit service:
 - a. vehicles will be kept clean and properly maintained;
 - b. drivers will be courteous and properly trained;
 - c. service will be provided within 30-45 minutes of telephone call.
6. Assure that contractor carries necessary liability insurance to protect the City from accident liability to riders and third parties.
7. Continue to assist the County in meeting the County's unmet needs insofar as it is demonstrated to the City's satisfaction that the County service in question will not adversely impact the quality of service provided to City residents;

ACTION SECTION

The Lodi Five Year Transit Plan consists of implementing the service objectives to the maximum extent feasible. To achieve this, a number of actions have been identified, including the primary action, which is to continue the existing service, upgrading as necessary. All actions are to be implemented in 1985 and continued in later years, unless otherwise indicated.

1. To meet the reasonable transit needs of all City residents (service objective #1), the City of Lodi will:

Continue the existing Dial-A-Ride service, upgrading where necessary. Specific capital improvements which have been programmed include purchase of a new or replacement vehicles in FY 1987-88; the function of these new vehicles (expansion or replacement) will be determined by the condition of the fleet and extent of transit needs at the time of purchase. The City is considering replacing the diesel engine in an existing cab with gasoline engine to further reduce capital costs.

Hold and advertise the annual unmet transit needs public hearings in November or December of each year. The present policy of holding two hearings will be continued. All hearings will be advertised by legal notice and by notifying persons and organizations known to have an interest in the subject of the hearings, including the Loel Center, the Lodi Service Center, and the Senior Citizens Center.

2. To minimize operating costs (service objective #2), the City of Lodi will:

Continue to work with the COG to insure that the City's position is fully communicated prior to future findings of unmet transit needs which are reasonable to meet.

Hold the required annual Productivity Improvement Committee meeting, in November or December of each year, to discuss productivity improvements and explore ways to reduce system operating costs.

3. To insure operating an efficient transit system (service objective #3), the City of Lodi will:

Continue to monitor system performance on a monthly basis. Any problem areas will be promptly brought to the attention of the contractor, with adjustments being made as warranted.

4. To foster community support and improve ridership (service objective #4), the City of Lodi will:

Advertise the service. Specific methods will include, but not be limited to, cable TV and advertisements and/or articles in the Lodi News-Sentinel.

Support the renewal of the annual Rotary Club promotion, if requested by the Rotary Club. In addition to providing free Dial-A-Ride tickets to local seniors, this promotion fosters positive perceptions of the Dial-A-Ride service by the business community and the news media.

5. To assure the provision of a quality transit service (service objective #5), the City of Lodi will:

Determine the extent of deviation from the 30-45 minute service standard - implement system improvements as warranted. This action will be performed by reviewing recently-submitted taxi company log sheets. Improvements -up to and including an additional vehicle or vehicles - will be made as warranted to insure meeting the service standard.

Maintain a record of transit complaints and review with the contractor on a regular basis.

6. To assure that the contractor maintains the necessary amount of liability insurance (service objective #6), the City of Lodi will be named in the insurance policy as co-insured, and will be notified when the policy coverage is reduced or cancelled for any reason. To assure this, the City of Lodi will pay the premiums for insurance.
7. To insure that the conditions for providing County service are fully met (service objective #7), the City of Lodi will:
Annually evaluate the impacts of County service, when negotiating a new contract with the County.

SUMMARY OF ACTIONS

The chart below summarizes the actions identified in the Action Section by service objective. All actions are to be implemented in 1985 and continued in later years, unless otherwise indicated.

| <u>Service Objective #</u> | <u>Action to Be Taken</u> |
|----------------------------|--|
| 1 | . Continue existing Dial-A-Ride service |
| 1 | . Hold and advertise annual transit "needs" hearings |
| 2 | . Continue to work with COG on potential transit "needs" findings |
| 2 | . Hold annual Productivity Improvement Committee meeting |
| 3 | . Continue to monitor performance on monthly basis |
| 4 | . Advertise transit service |
| 4 | . Support renewal of the annual Rotary Club promotion, if requested by the Rotary Club |
| 5 | . Determine extent of deviation from 30-45 minute service standard - make changes as necessary |
| 5 | . Maintain record of complaints - regularly review with contractor |
| 6 | . Name City as co-insured |
| 7 | . Annually evaluate impacts of County service |

POTENTIAL FUTURE ISSUES

The previous sections have outlined the service objectives and the actions needed to implement them. The purpose of this section is to briefly discuss some issues which are not now of concern, but which may become a concern as the five year period encompassed by this plan progresses.

The Lodi Dial-A-Ride is currently operating at close to capacity. The possibility of adding new vehicles has been discussed. As an alternative to adding more station wagons (capacity = 5), it is possible that one or more vans or minibuses might be needed (capacity = 9-16). This option would become attractive if greater vehicle capacity is needed. If desired, such a vehicle could be equipped with a wheelchair lift for handicapped accessibility. Offsetting the capacity and possible accessibility gain would be the cost - approximately \$35,000 (in 1985 dollars) for a lift-equipped minibus. Operating costs would also increase, due to higher maintenance and insurance, and lower fuel economy.

A final potential future issue involves the possibility of intercity service to Stockton. The COG Transit Development Plan identifies such service as a potential future unmet need.* Discussions with COG staff reveal their thinking - a Lodi-Stockton fixed route loop, making the circuit possibly four times per day, stopping at key locations in Lodi and Stockton. Such a route would double as a partial fixed route local service, and could be operated for \$60,000 to \$80,000 per year (less fares), according to COG staff.

Alleged benefits aside, it is the position of the City of Lodi NOT to fund intercity transit out of local LTF and STA funds. Such funds are properly reserved for purely local Lodi needs.

*the same document also projects a potential future need for transit service to the whole of the Acampo community.

FINANCIAL SECTION

In this section, the costs of implementing the Lodi Five Year Transit Plan are discussed. For financial planning purposes, it is assumed that the conditional actions identified in this plan will be implemented (exception: no vans or minibuses are programmed). Specifically, it is assumed that subscription service, lower general public fares, and reduced waiting times are implemented. Collectively, these actions will make the system more attractive to riders, and hence, can be expected to increase ridership. Since the current system is operating at or close to capacity, an additional vehicle will be needed. Due to maintenance problems with the diesel-powered station wagons, vehicles have to be replaced faster than anticipated. In the past year, three were replaced and one expansion vehicle was added.

The projected operating and capital expenses to implement the above are given below. In FY 1986-87 two gasoline vehicles will replace the two remaining diesel station wagons.

Lodi's Projected Transit Costs and Income Sources FY 1987 - FY 1991 (City Service Only)

| | FY 86-87 | FY 87-88 | FY 88-89 | FY 89-90 | FY 90-91 |
|-------------|----------|----------|----------|----------|----------|
| Operating | 206,600 | 212,775 | 219,185 | 225,760 | 232,530 |
| Capital | 27,300** | -0- | -0- | 15,000** | 0 |
| Total | 233,900 | 212,755 | 219,185 | 240,760 | 232,530 |
| TDA Income* | 730,512 | 773,765 | 819,579 | 868,106 | 919,506 |

*projected TDA funds available at estimated 5.5% per year

**reflects addition of replacement station wagon

A brief glance at the past operating history of the Lodi Dial-A-Ride reveals steady increase in both ridership and system operating costs over the period FY 1981 - FY 1984 (see chart below). Not shown by the chart is the fact that ridership (and expenditures) have finally started to level off. For example, the six month period ending in September, 1984 actually witnessed a slight decline in ridership over the six month period ending in September 1983 (29,019 passengers vs. 30,033). 1985-86 ridership increased. A part of this increase is due to a reduction of fares from \$2.00 to \$1.00.

Lodi Dial-A-Ride Operating Costs and Other Selected Statistics FY 1981 - 1986

| | FY 1981 | FY 1982 | FY 1983 | FY 1984 | FY 1985 | FY 1986 |
|---------------|---------|---------|---------|---------|---------|---------|
| Operating | | | | | | |
| Costs | 88,732 | 127,703 | 177,971 | 191,636 | 182,978 | 211,302 |
| Fare Revenue | 21,388 | 23,480 | 32,409 | 33,393 | 30,539 | 37,853 |
| Passengers | 35,903 | 43,661 | 56,650 | 61,755 | 58,869 | 70,480 |
| Fares/ | | | | | | |
| Costs (%) | 24.1% | 18.4% | 18.2% | 17.4% | 16.7% | 17.9% |
| Cost/Passngr. | 2.47 | 2.92 | 3.14 | 3.14 | 3.11 | 3.00 |

REVENUE SOURCES

Transportation Development Act Funds - The Transportation Development Act (TDA) was passed in 1971 to provide California sales tax revenue for transportation purposes. In 1979 AB 620 was passed establishing a second fund under TDA rules. The result is that under the TDA's rules and regulations there are the Local Transportation Fund (LTF) and the State Transit Assistance Fund (STA). Both of these funds were available to local governments for public transit, roads and Streets, bicycle and pedestrian facilities, planning and administration, and even AMTRAK expenses. Also, portions of COG's administration and planning expenses are funded from the Local Transportation Fund.

Local Transportation Fund (LTF) - The source of funding for the LTF is the state sales tax on gasoline. The COG annually estimates revenues for the year, apportions these funds to local governments based on the TDA law and regulations, approves, and then make allocations. State law requires that after allocation of funds for TDA administration, bicycle/pedestrian apportionments (up to 20%) and transportation planning, the funds must be apportioned based on a jurisdiction's population. The LTF was designed to fund public transit, and then, when all those needs were met, to fund road and street expenses and all other eligible purposes.

Transit Assistance Funds were vetoed by the Governor in 1986.

Fares are direct payments from passengers for each ride provided. Fares vary among transit systems. The Transportation Development Act requires that a certain ratio of total transit expenses be recovered from the farebox for some transit programs. For the Lodi system the ratio is 10%.

Due to the unexpected early loss of State Transit Assistance (STA) funds, more money from the Local Transit Fund (LTF) will be allocated to transit and less to roads and streets. The Regional Transportation Plan projects sufficient LTF funds through the end of the decade for the City of Lodi. Countywide, 35-40% of STA funds have been allocated to roads and streets. For Lodi, this has been 75%.

The City expects farebox revenue to rise due to increased general public ridership with the fare reduction. To accomplish this, ridership must double. Should the farebox return drop below 10%, the City could alter its contract with the taxi company to comply with "Contracted Transit Service" rules exempting the City and using the "operating cost per passenger" rule, as Escalon did when it failed to meet its farebox ratio.